Sunflower PPMS CD 50:

Add and Update Assets



User Guide

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Introduction

NOAA's CD 50 transaction pages allow authorized Property Custodians (PCs) the ability to create or update an Inventory or Agreement asset directly in Sunflower.

This user guide describes the functionality of these CD 50 pages, and outlines the steps required to add and update assets and run the report listing the transactions conducted. Highlights of the functionality include:

- A CD 50 transaction page named Create New Asset that will allow PCs to create Inventory or Agreement assets in Sunflower.
- A CD 50 transaction page named Maintain Asset Detail that will allow PCs to modify Inventory or Agreement assets in Sunflower.
- Required validations in the transaction pages so asset transactions meet NOAA personal property business rules and minimize errors encountered by PCs.
- PCs will be able to request and approve transfers of Inventory Assets to other NOAA Custodial Areas.
- A report which allows PPMB to identify all the NOAA assets that are created or updated in Sunflower via the CD 50 transaction pages.

Additional Functionality

Additional functionality is available to ensure data integrity and to keep a proper separation of duties. For example:

- Property Custodians cannot update Inventory Assets with an existing Excess Asset record through the Maintain Asset Detail screen – these records will be view only.
- Property Custodians can only update Location, User and Attachments on capital assets. All other fields will be view only.
- When capital asset records are created in the Create New Asset screen, (i.e., assets \$200,000 or more), a NOAA Financial Manager will receive email notification of this addition.
- Property Custodians can add attachments to retired Inventory Assets.
- Property Custodians will only be able to add/update Agreement Assets if they are authorized to transact on those Agreements.

- Property Custodians will not be able to transfer Agreement Assets PPMB will have to be consulted to conduct these transactions.
- Only Property Custodians will be able to <u>accept</u> transfers.
- Property Custodians and Line Office Representatives will now receive emails on LOANED OUT assets 30 days from when they are due back and five (5) days from when they are due back. (If the Activity Status is set to LOANED OUT, the Expected Return Date will drive when the emails are sent.)

Error Handling

When an error is encountered, it is either because a required value was left blank, or a value entered did not meet certain validation requirements. When an error is encountered in a pop-up window, then the PC has either left a required field blank or has entered a value that doesn't meet NOAA-specific requirements. If an error message appears in red at the top of the screen, this means the value entered did not meet standard Sunflower validations, or that a value required by Sunflower was left blank.

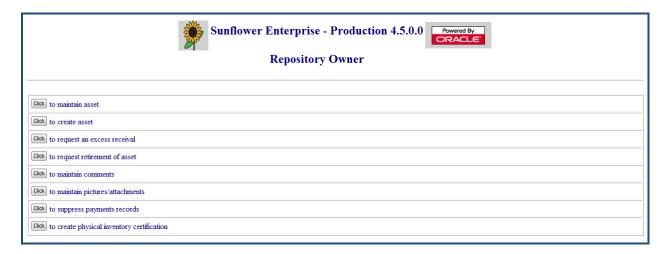
CD 50 Create New Asset

The purpose of the Create New Asset page is to allow Property Custodians the ability to directly create Inventory and Agreement assets in the Sunflower PPMS. To add a new asset to Sunflower:

- 1. Property Custodians need the Inventory Clerk role and be an active Asset Center Representative Organization Contact for the Custodial Area s/he is transacting against.
- 2. Property Custodians need the Agreement Clerk role, and be authorized to transact against the Agreement s/he is transacting against.
- 3. Property Custodians must enter information in all required fields. Required fields are labeled with a red asterisk.



1. Enter the <u>CD 50 / 52 Transaction Menu</u>



2. Click to create asset



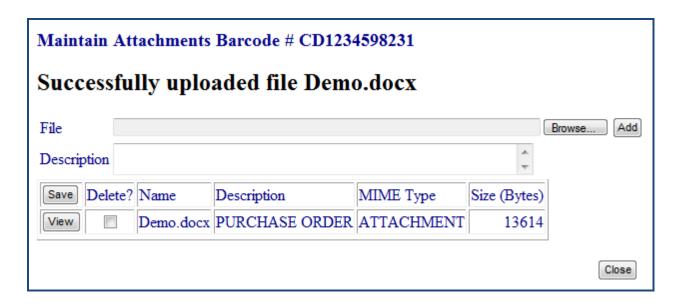
3. Select Interest Type (Inventory Asset or Agreement Asset)

Note: When adding **Agreement Assets**, Property Custodians (PCs) are required to select the Agreement. PCs will only see those Agreements on which they are authorized to transact.

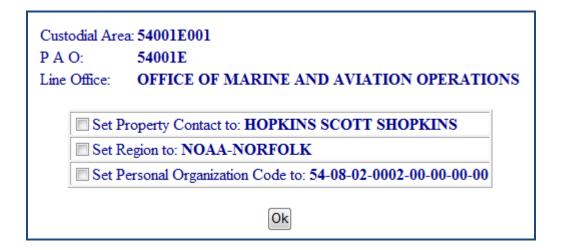
- 4. Enter **Barcode #** must begin with CD and have 12 characters
- 5. Click the Attachment button



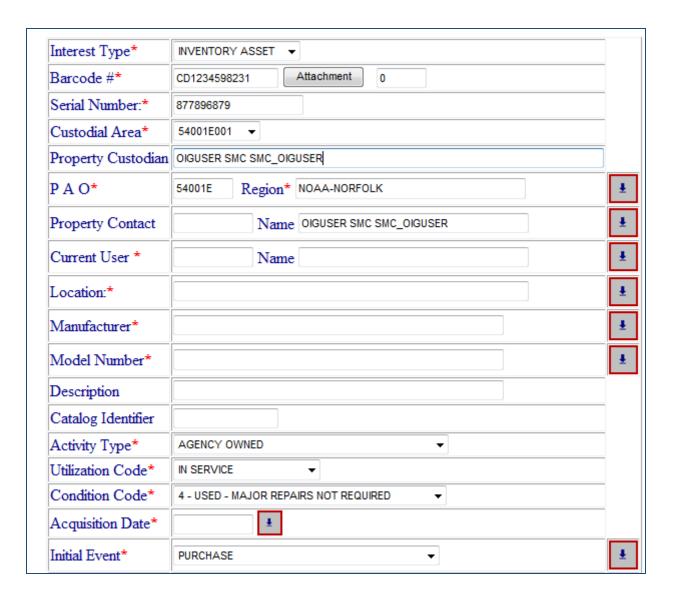
- 6. Click the Browse button and find the file to be attached
- 7. Once the file is found, click the **Add** button.



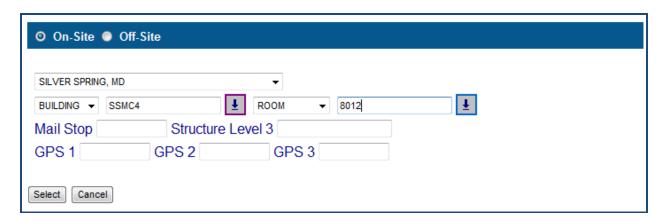
- 8. Click on **Close** to close the **Attachment** pop up screen
 - a. Alternately click on **Delete?**, then **Save** to remove the attachment
- 9. Enter Serial Number
- 10. Select Custodial Area from the list of values Accept the defaults in the pop-up window
 - a. Note: You will only see the Custodial Areas you are authorized to transact on



- b. Accept the defaults in the pop-up window and these values will automatically populate on the CD 50 screen.
- c. Alternately, do not accept the defaults, and enter the information manually on the CD 50 screen

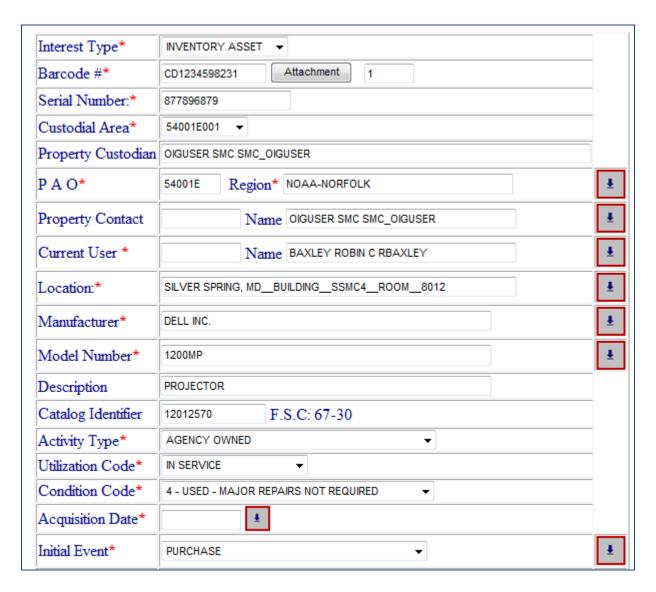


- 11. Enter Current User
- 12. Open the Location window and enter Location



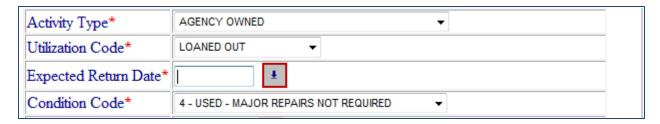
- 13. Enter Manufacturer
- 14. Enter Model Number

Note: If you do not see the Model Number you need, please stop entering the asset information and submit a Catalog Request Form to the Sunflower Management Center (help desk).



- 15. Activity Type will default to Agency Owned change as needed
- 16. Utilization Code (Activity Status) will default to In Service change as needed

Note: When **LOANED OUT** is selected as the **Utilization Code**, PCs must enter an **Expected Return Date** that is a date *after* the **Acquisition Date**. If other Utilization Codes are selected, the **Expected Return Date** field is not available. (See below for example).



17. Condition Code – defaults to 4 – Used – Major Repairs not Required.

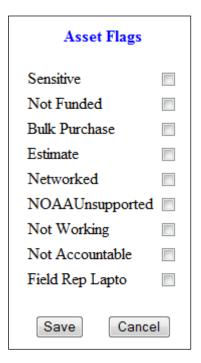
Note: Please contact your PPMB Line Office Representative if you feel the Condition Code needs to be changed.

18. Enter Acquisition Date

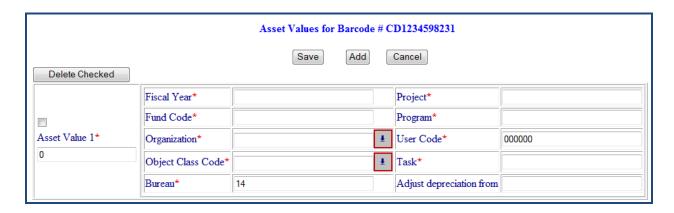
Note: **Responsibility Date** will default based on the Acquisition Date entered. This date can be updated in the CD50 To Maintain Asset screen

- 19. Initial Event will default to Purchase change as needed
- 20. **Flags** select a value as needed. All items considered "Sensitive" will automatically receive the Sensitive flag once the record is saved.

Note: If you have any questions about what the flags mean, please contact your Line Office Representative before selecting a value.



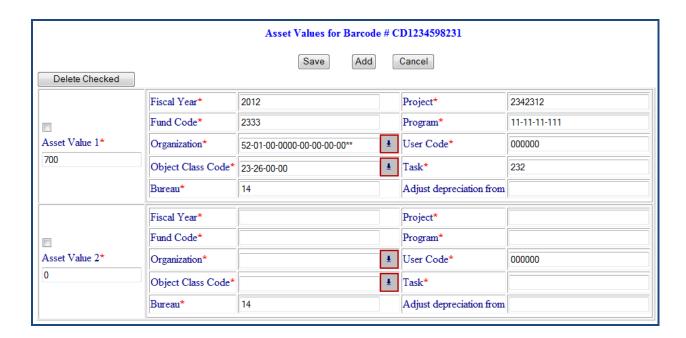
21. Open the Asset Value User Defined Fields (UDFs)



Each mandatory value within the Asset Value Components window has validations that must be met for the PC to save:

- a. Enter Fiscal Year (four digits)
- b. Enter **Project** (seven characters or less)
- c. Enter **Fund Code** (three to five characters)
- d. Enter **Program** (numeric, format should be NN-NN-NNN)
- e. Select **Organization** from the list of values <u>do not</u> select an Organization with the word **END** in it
- f. Enter User Code or accept default of 000000
- g. Select Object Class Code from the list of values
- h. Enter Task (three characters)
- i. Enter Bureau or accept default of 14

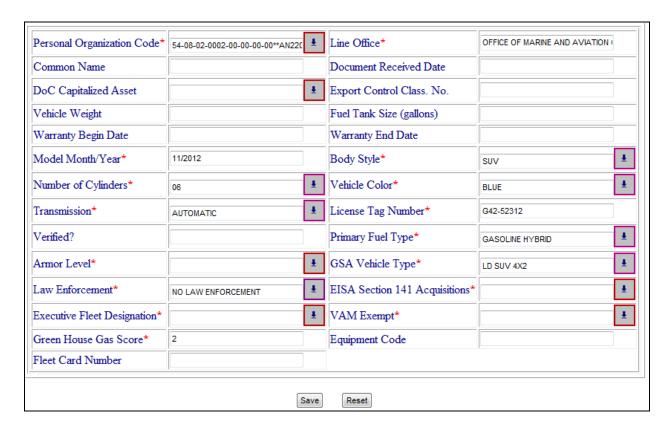
Note: To add additional Asset Value Component, click the **Add** button and complete the information in the second Asset Value Component section. The PC may add as many Asset Value Components as needed, and all the values will add up to the total Asset Value on the asset record.



Note: To delete an Asset Value Component, click on the box above the component, then click the **Delete Checked** box. An example of a completed Asset Value Component window is shown above.

- 22. Select a Document Type
- 23. Enter a Document #
- 24. Depending upon the type of asset being entered, users may have to enter information in the User Defined Fields at the bottom of the screen before saving (look for the red asterisks to determine which fields are required). The examples below show **vehicles**, which have several mandatory fields to enter:

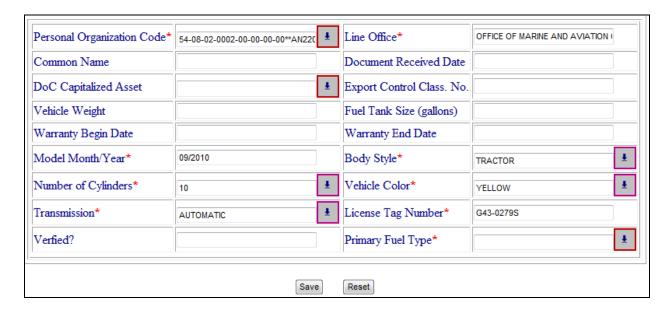
FSC Code 2310 (Passenger Motor Vehicles)



Important Note: Users do not have to enter information in the following four fields, as the information for these fields will default when the user saves the record:

- Armor Level will default to N/A
- EISA Section 141 Acquisitions will default to Yes
- Executive Fleet Designation will default to No
- VAM Exempt wil default to COV

FSC Code 2320 (Trucks and Tractors, Wheeled)



25. Once all required User Defined Fields are completed, (as necessary), click the **Save** button at the bottom



26. Click the Reset button at the bottom to duplicate an asset

Duplicate Asset Creation

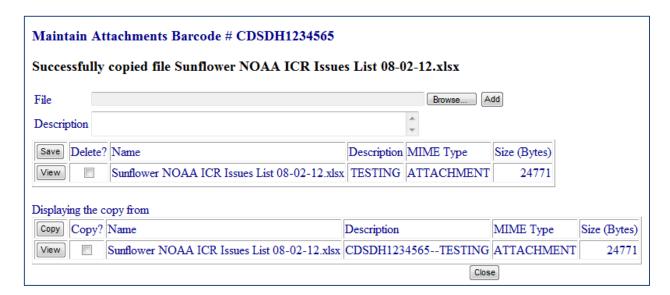
Once a new asset record has been saved, PCs have the opportunity to create duplicate records. For example, if a PC is adding ten asset records for the same type of laptop, the duplication feature would be utilized. Once the previous asset record is saved:

- 1. Enter Barcode # must begin with CD and have 12 characters
- 2. Open **Attachment** field the attachment from the previous asset is available for you to copy to the new asset.



- 3. To copy the attachment from the previously saved asset, click the **Copy** radio button
 - a. Otherwise browse for a new file
- 4. Click the **Copy** button to copy the attachment from the previous asset

Note: The new attachment shows above the document attached to the previous asset.



- 5. Click Close to close the Attachment window
- 6. Enter Serial Number
- 7. Update other information as needed, such as **User** and **Location**
- 8. Click the **Save** button at the bottom

CD 50 Maintain Asset Detail

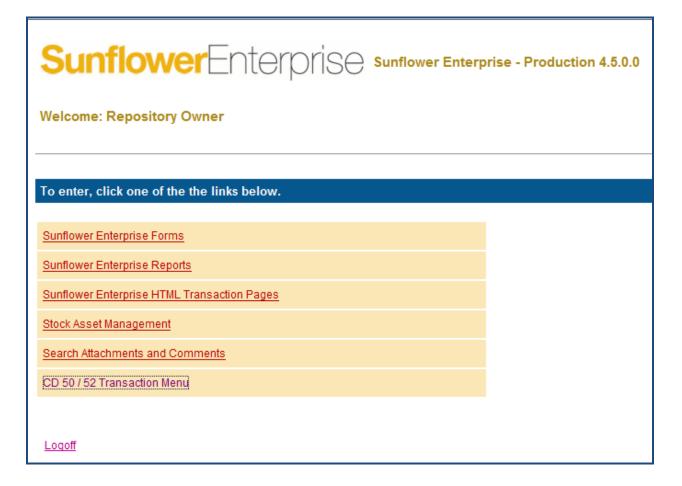
Once Inventory or Agreement asset records have been created, PCs will use the **CD 50 Maintain Asset Detail** screen to update asset records.

Property Custodians should be able to update all fields except the following:

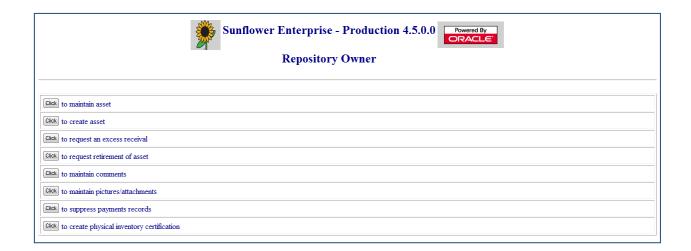
- 1. Barcode
- 2. Interest Type
- 3. Initial Event, and
- 4. UPR Identifier, but should be able to update everything else.

Users listed as Property Contacts on asset records should only be able to update the following fields:

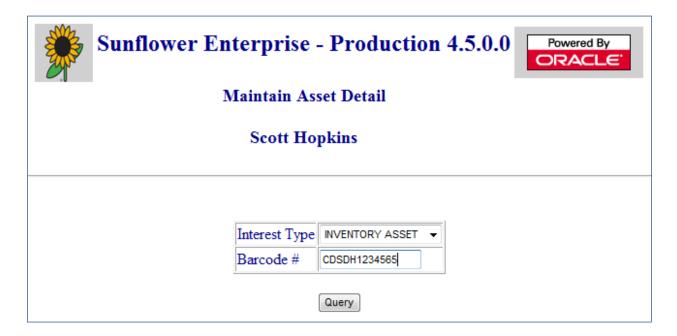
- 1. Location
- 2. User
- 3. Attachments



1. Enter the CD 50 / 52 Transaction Menu



2. Click to maintain asset



3. Enter an existing **Barcode #** and click on **Query** button – the existing asset information should appear



- 4. Update fields as needed
 - a. As noted above, the following fields are the <u>only</u> fields that should be available for persons listed as Property Contacts on asset records
 - i. Location
 - ii. User
 - iii. Attachments
 - b. Property Custodians should <u>not</u> be able to update Barcode, Interest Type, Initial Event, and UPR Identifier, but <u>should</u> be able to update everything else
- 5. Click the **Save** button at the bottom
 - a. You should receive a message at the top saying Inventory/Agreement Asset CDXXXXXXXXX Modified



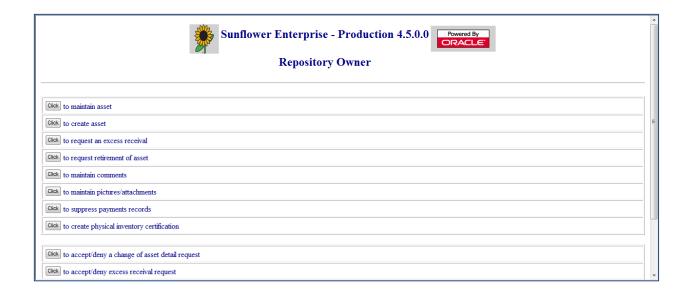
Transfers

The CD 50 Maintain Asset Detail screen will also be used to request and accept transfers.

Request Transfer



1. Click on the CD 50 / 52 Transaction Menu link.



2. Click the to maintain asset button.



3. Enter the **Barcode #** for the asset to be transferred and click the **Query** button.



4. Enter the requested Custodial Area in the Requested Custodial Area field and hit Tab.

Note: A message will appear asking if you'd like to create a transfer request to that Custodial Area.



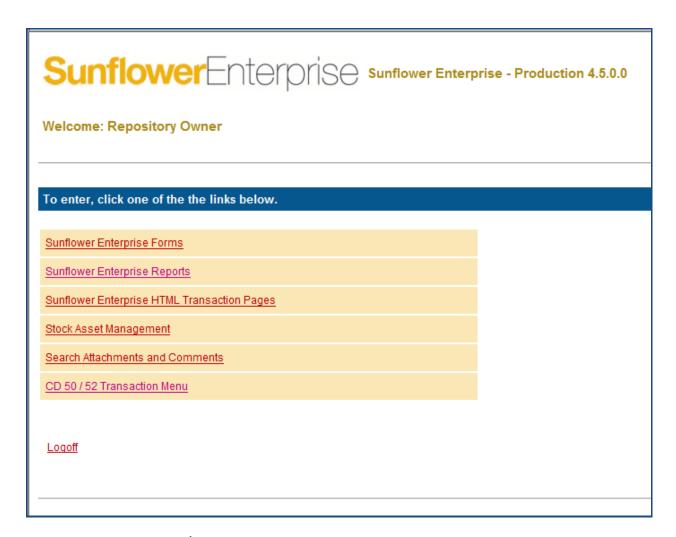
5. Click the **Create Request** button.

Note: A message will appear indicating the request has been successfully created, and the requested PC will receive an email notifying them of the pending transfer request.

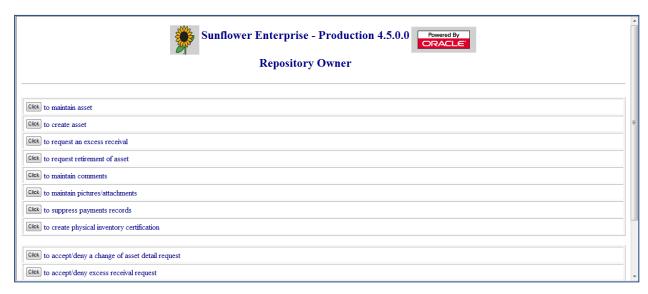


Accept Transfer

To accept a transfer, the 'accepting' PC will enter the **to maintain asset** screen and pull up the existing asset. This will allow the 'accepting' PC to accept or deny the request.



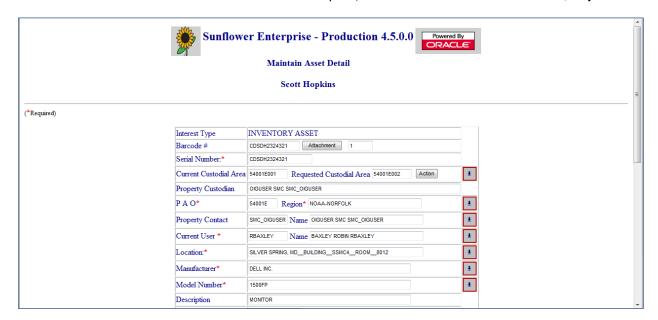
1. Click on the CD 50 / 52 Transaction Menu link.



2. Click the to maintain asset button.



3. Enter the **Barcode** # for the asset to be accepted/denied for transfer and click the **Query** button.



4. Click on the Action button next to the Requested Custodial Area.

OIGUSER SMC SMC_OIGUSER requested a transfer of Barcode # CDSDH2324321 Description MONITOR Manufacturer DELL INC. 1500FP Model Number Current Custodial Area 54001E001 Asset value \$275.00 To: 54001E002 Approve Deny Request Cancel

- 5. Click the **Approve** button to approve the transfer, or the **Deny Request** button to deny the transfer.
- 6. Update other information as needed, such as the **User** and **Location**.

Generate CD 50 Asset Transaction Report

The **Asset Transaction Report** displays a number of transaction types, such as:

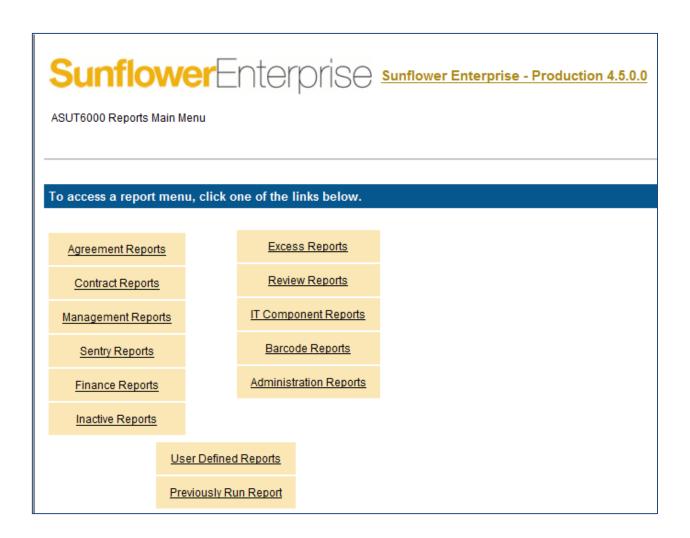
- Inventory and Agreement Asset Additions
- Asset Changes
- Transfers
- Asset Value Changes
- Retirements

This report displays the:

- Barcode
- Line Office
- Custodial Area
- Name of person who conducted the transaction
- Transaction date/time
- Transaction Type



1. Click on the **Sunflower Enterprise Reports** link



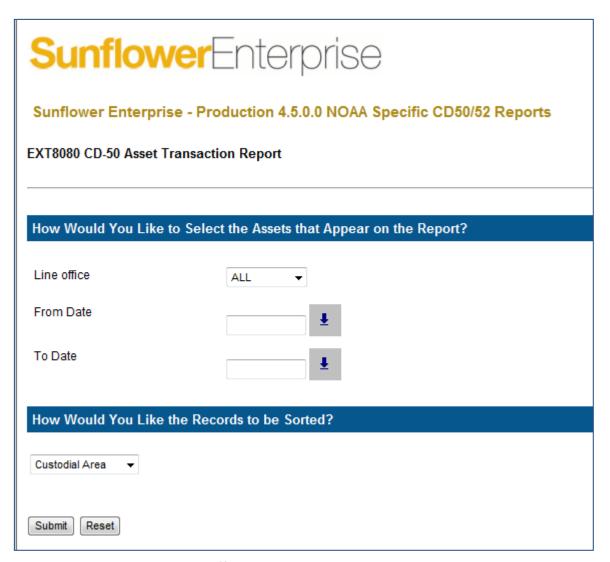
2. Click on the **User Defined Reports** link



3. Click on the NOAA Specific CD50/52 Reports link



4. Click on the CD-50 Asset Transaction Report link



- 5. As needed, select a Line office
- 6. Enter a From Date and a To Date
- 7. As needed, sort by either of the following:
 - a. Custodial Area
 - b. Barcode
 - c. Line Office
 - d. Transaction Date
 - e. User Name
- 8. Click on the **Submit** button
- 9. Select your **Output Format**
 - a. Acrobat
 - b. HTML
 - c. Text file export (Excel, Lotus 1-2-3, Access...)

SunflowerEnterprise Sunflower Enterprise - Production 4.5.0.0 NOAA Specific CD50/52 Reports EXT8080 CD-50 Asset Transaction Report Choose an output format Acrobat HTML Text file export (Excel, Lotus 1-2-3, Access...) Press execute to run the report in this window or Press Background to run the report in the background Selection Criteria: 411478 Selected by Value Line Office ALL 06/01/2012 00:00:00 From Date To Date 08/08/2012 23:59:59

10. Click on the **Execute** button. The report will show transactions such as transfers, asset additions, asset changes, and asset value changes.

Sunflower ext8080	Assets		CD-50 Asset Transaction	Report	Page 2 of 4
	LINE	CUST			08/08/2012 07:57
BARCODE	OFFICE	AREA	NAME	TRANS DATE	TRANS TYPE
CD0000000002	OMAO	54001E001	SHARAF AHMED CPPAS5	06/04/2012 12:23:22	TRANSFER FROM 54001W049
CD0000000002	OMAO	54001E001	SHARAF AHMED CPPAS5	06/04/2012 12:40:53	TRANSFER FROM 54001W049
CD0000000037	OMAO	54001E001	SHARAF AHMED S 533643	06/05/2012 09:34:47	INVENTORY ASSET ADDITION
CD0000000037	OMAO	54001E001	SHARAF AHMED S 533643	06/05/2012 09:34:48	CHANGE
CD0000000038	OMAO	54001E001	SHARAF AHMED S 533643	06/05/2012 09:39:00	INVENTORY ASSET ADDITION
CD0000000140	OMAO	54001E001	SHARAF AHMED CPPAS5	06/06/2012 09:26:43	CHANGE
CD0000000140	OMAO	54001E001	SHARAF AHMED CPPAS5	06/06/2012 09:26:43	INVENTORY ASSET ADDITION
CD0000000150	OMAO	54001E001	SHARAF AHMED CPPAS5	06/14/2012 09:36:46	ASSET VALUE CHANGE
CD00INVTEST5	OMAO	54001E001	REZAEI ALAN 550887	06/20/2012 10:13:02	ASSET VALUE CHANGE
CD1234567891	OMAO	54001E001	HOPKINS SCOTT SHOPKINS	07/13/2012 15:28:12	ASSET VALUE CHANGE